

15A09

Recruitment for Rookies

Tuesday, July 15, 2008
12:00-1:30 p.m.



National Conference on
**Student Recruitment,
Marketing, and Retention**

JULY 15-17, 2008 — CHICAGO, ILLINOIS

Convened by

Noel-Levitz®

Recruitment for Rookies

Wes Butterfield
Executive Consultant

Noel-Levitz[®]

Enrollment at your institution – which direction are you headed?



There are many factors that affect the direction your institution's heading.

What roadblocks do you encounter
on your road to success?



What are the roadblocks you're encountering along the way?

Do you have an enrollment plan?
How is it working?



How are you doing executing your enrollment plan? Do you have an enrollment plan? Let's see a show of hands. How many are in the midst of developing an enrollment plan? How many have one...you think? How many of you are fully evaluating and executing your plan?

Developing a written new student enrollment plan



Similar to the need to develop a long-range strategic enrollment and revenue plan, the Office of Admissions needs to develop a written annual marketing and recruitment plan. Development of a written recruitment plan is imperative to continued enrollment success. It includes the following elements:

- Situation analysis
- Goals
- Strategies
- Action plans
- Resource requirements

Enrollment management plans benefit campuses in many ways

Does your campus have:	Public 4-Year	Private 4-Year	2-Year	Overall
Annual, comprehensive, written enrollment management plan addressing both recruitment and retention	45.9%	36.6%	41.4%	39.6%
Annual marketing/recruitment plan	83.6%	75.8%	60.3%	74.2%
Annual retention plan	31.1%	27.5%	29.3%	28.7%
Comprehensive strategic enrollment plan	57.4%	47.7%	29.3%	45.8%
None of the above	4.9%	8.5%	19.0%	9.8%

2004 National Enrollment Management Study

Benefits of planning:

1. Ensures more effective use of resources
2. Assigns work and responsibility
3. Facilitates control and evaluation of activities
4. Provides a basis for future planning
5. Coordinates and unifies staff effort
6. Results in the establishment of consensual institutional goals

The value of not planning

“The nicest thing about not planning is that failure comes as a complete surprise and is not preceded by a period of worry and depression.”

John Preston
Boston College

You certainly don't have to have one...



We will discuss four key points that can make a difference in your world:

1. Define the current state of new student enrollment
2. Establish clear and realistic goals
3. Develop strategies to reach each goal
4. Put your strategies into action – write action plans



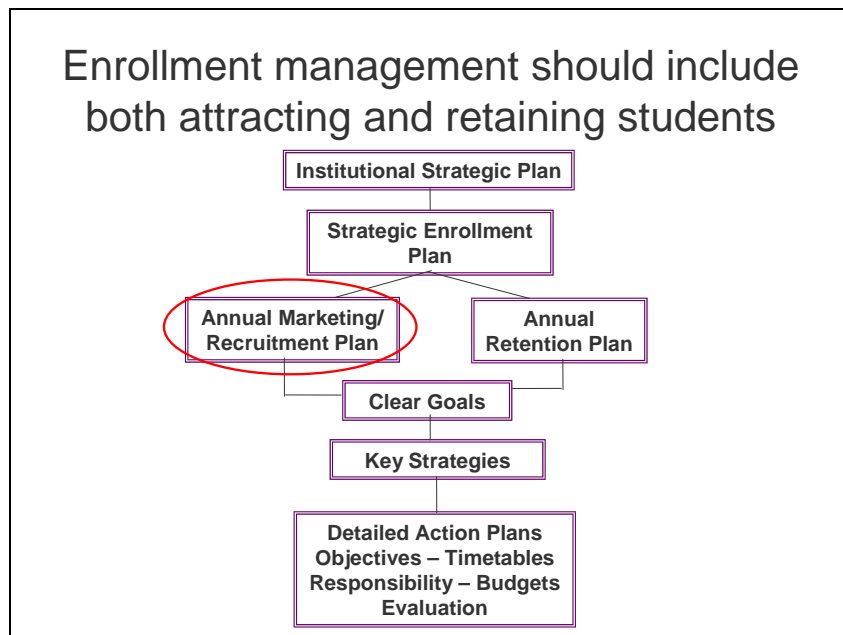
It is important to understand the current state of enrollment for your university:

- Where is it strong?
- Where do you need improvement?



The annual recruitment plan should be consistent with the mission of the university and with the strategic plan.

Include the mission statement in the recruitment plan.



Enrollment management is a systematic, holistic, and integrated approach to achieving enrollment goals by exerting control over those institutional factors that shape the size and characteristics of the student body. It encompasses all activities associated with attracting and retaining students, including marketing, recruitment, financial aid, orientation, advising, and instruction. It also involves examining institutional mission, program and service offerings, organizational structure, and resource allocation. The enrollment management process relies heavily on the use of pertinent data and information for informed decision making.

The annual recruitment plan
is one piece of the puzzle



Differences between the annual plan and the strategic enrollment plan...

Strategic plan:

- Is more long-term – five-year goals
- Is broader in scope
- Places more emphasis on product and marketing strategies

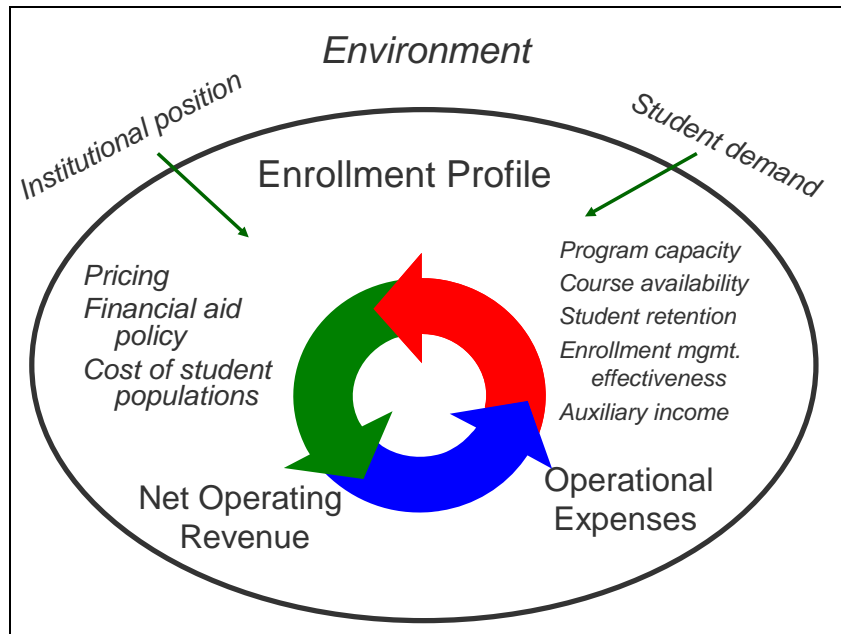
Annual plan:

- Outlines all of the technical aspects of the work that goes on in the admissions office on a daily basis. By having a plan, we can make modifications and enhancements on an annual basis.

Simply stated...enrollment management is
more than the recruitment of new students



As we all know, enrollment management is more than just the recruitment of new students.



Many factors need to be taken into consideration.

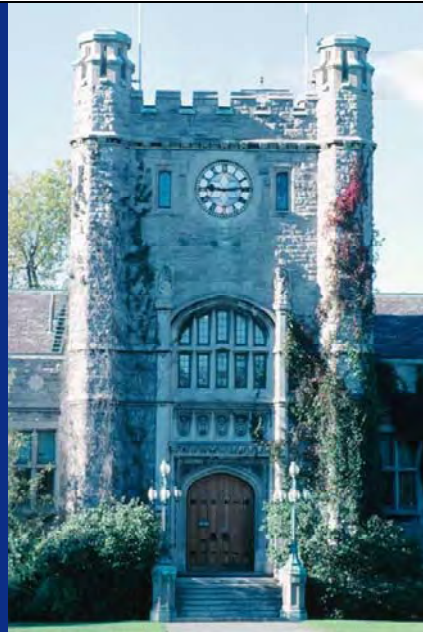
Identify well-conceived **broad strategies** to achieve desired enrollment results



- University branding and marketing
- New student recruitment
- Retention/quality of student life and learning
- Research and management information commitment
- Physical facilities, especially housing (when was the last time you took the money walk...explain)
- Fiscal enrollment management
- Organization and accountability for plan implementation

You have to have the ear of the president's council to talk about the effects of these broad strategies....

Form a university
executive enrollment
management council



Importance of an enrollment management council:

- Reviews the bigger enrollment picture from new student recruitment to retention
- Helps the campus to streamline processes such as advising, registration, orientation, etc.

Why you need an executive
management council



- Ensures that all offices are working together to reach enrollment goals
- Council should include key staff members in admissions, financial aid, orientation, housing, and a faculty representative (I've also seen councils with alumni affairs representation)



These are the factors that help or hinder the university in reaching goals:

- Driving forces are strengths and opportunities
- Restraining forces are weaknesses and threats

What are our strengths and opportunities?

Strengths: Existing characteristics – physical, human, and financial – that clearly contribute to institutional success and the achievement of enrollment goals

Opportunities: Internal and external factors that have the potential to be developed into strengths

Examples of strengths:

- Strong endowment
- Experienced staff
- Excellent academic programs

Examples of opportunities:

- Demographics such as an increase in high school graduates in the school's primary or secondary market area
- Development of new academic program
- Plans for new buildings on campus

Examples of strengths and opportunities on your campus?

Slide 20

Be honest about weaknesses and threats

Weaknesses: Existing characteristics – both internal and external – that detract from institutional success and the achievement of enrollment goals

Threats: Internal or external conditions that are obstacles to institutional success and achievement of enrollment goals

Examples of weaknesses:

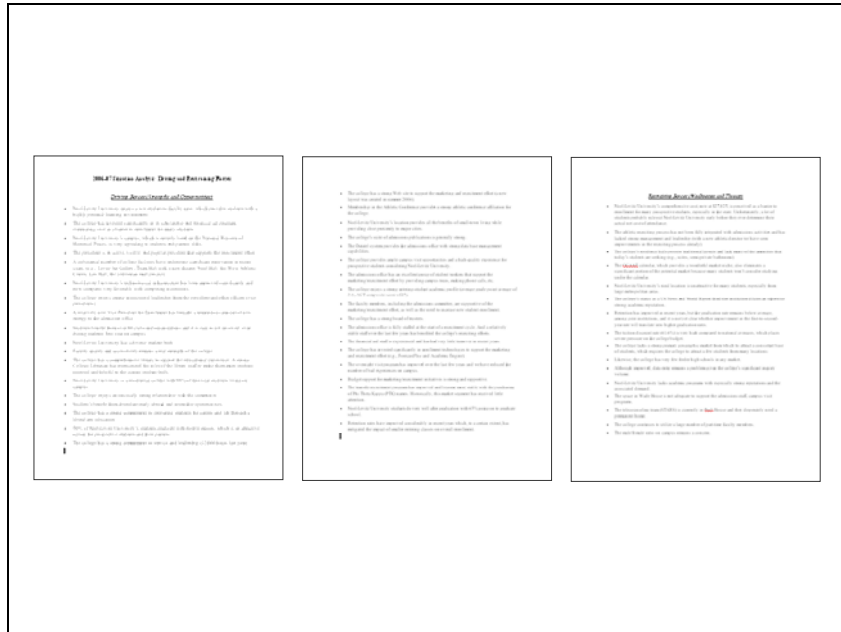
- Staff turnover
- Under-staffed
- Limited financial resources to implement key strategies

Examples of threats:

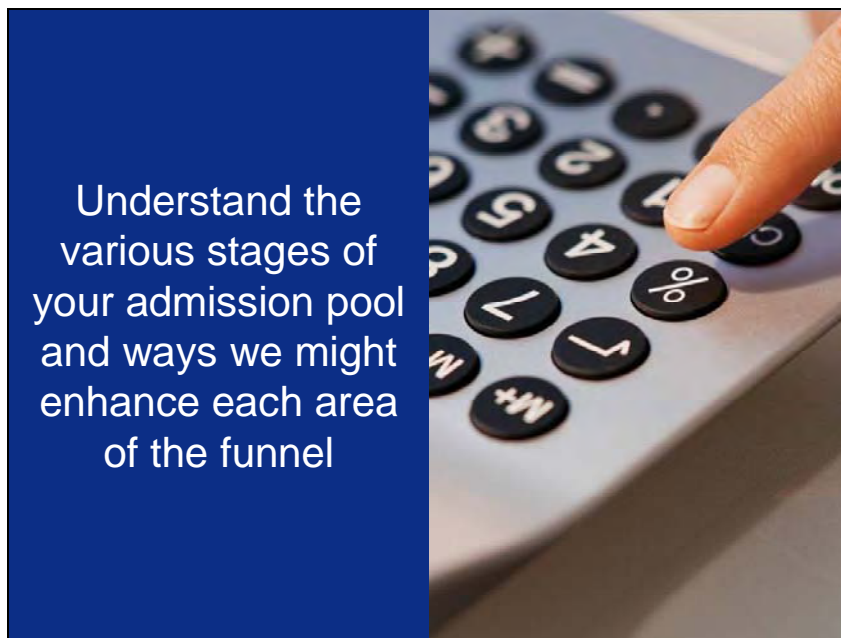
- Demographic data such as a decline in high school graduates
- Campus safety – one incident can hinder recruitment potential

Examples of weaknesses and threats on your campus?

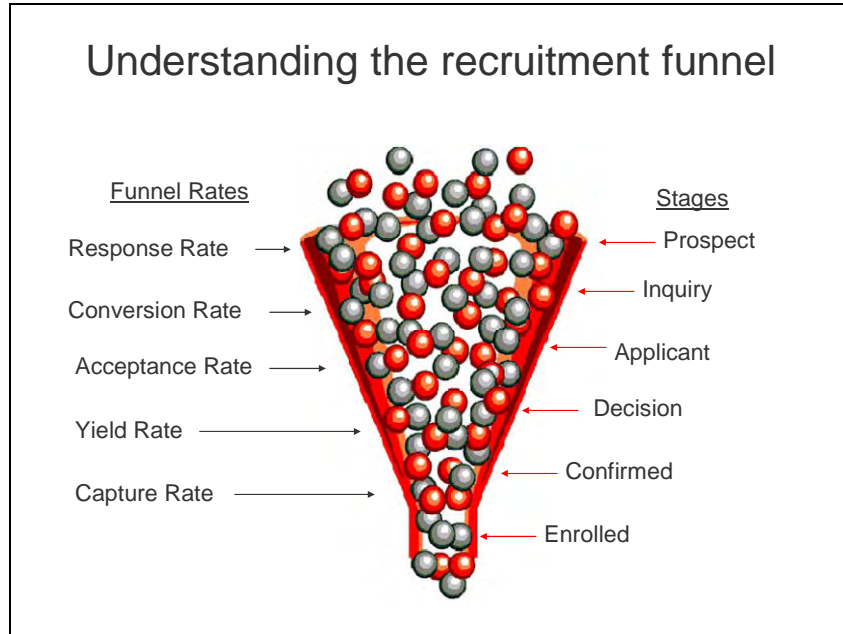
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I just mentioned being honest. Let me share an example of a school I was working with and what they ended up with. Two glorious pages of strengths and opportunities and only one page of weaknesses and threats. Nice!



And because there are various stages of the admissions pool with this session we want to make sure we're using the same language. Let's briefly talk about these stages.



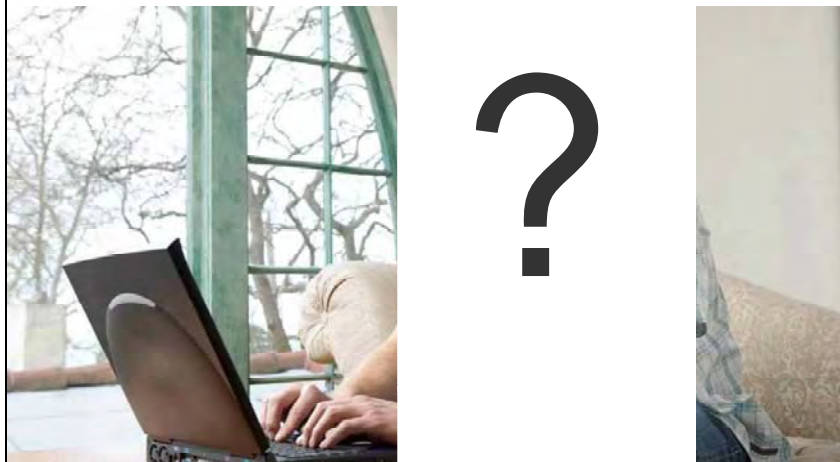
In many cases, the prospects are the very top of your admissions pool (some folks call these students suspects). These students typically don't have very much information about your institution. An example of a prospect would be a search name that's been purchased through the College Board, ACT, NRCCUA, or the College Bound Selection Service.

Inquiries



Inquiries are the students who have told us they are interested in our institution (we like these students). They have essentially raised their hand and said, “I’m interested in finding out more.” Most communications plans are built around trying to influence this group of students. And trying to influence these students is starting earlier and earlier, as many colleges and universities are communicating with sophomores and juniors.

The “secret shopper” phenomenon



Students who are entering your funnel (usually at the time of application) are a group many institutions are trying to get their arms wrapped around.

Applicants



We all know and love these guys.

Admits



And nothing better than a student opening their mailbox/e-mail account or even receiving a text message telling the "YES!" Think about our admit pools. For some students this is the first real step toward...independence!

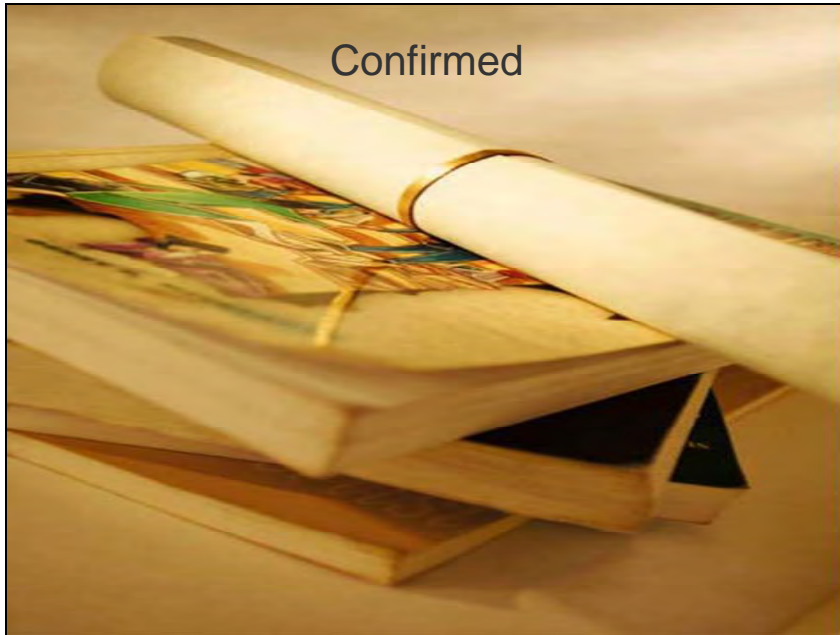
At this stage we have students making final decision about our college campuses. They are visiting, working through the financial aid process, and trying to understand the differences between the various schools they are considering. How many of our communication plans begin here?

Enrolled/deposited



These are students who have essentially told the institution they are coming. In many cases, they have paid some type of deposit. How many of have a paid “enrollment” deposit out there?

Confirmed



And finally our enrolled students are those present when classes start. We keep our fingers crossed that all of the hard work we have done all year, with contact by mail, e-mail, texting, and IMing, has paid off and the students we’re counting on arrive on our campus. This was always one of my favorite days of the year!



The enrollment planning process needs to be done using pertinent enrollment data.

Utilize historical funnel data in your planning process

Noel-Levitz University						
Fall 2007 Funnel Report - First Time in College (FTIC)						
	2007 (as of Dec 1)	2007 (GOALS)	2006 (as of Dec 4)	2006 Final	2005 Final	2004 Final
Prospects	10,000	15,000	0	1,800	n/a	n/a
Inquiries	1,502	2,500	1,200	1,606	2,036	2,042
<i>Conversion</i>	2.2%	7.0%	1.2%	6.6%	4.9%	5.0%
Applications	33	175	14	106	100	102
<i>Admit Rate</i>	100.0%	85.0%	92.9%	94.3%	100.0%	100.0%
Admit	33	149	13	100	100	102
<i>Yield Rate</i>	TBD	67.0%	TBD	78.0%	77.0%	83.3%
Enrolled		100		78	77	85

The funnel report helps the institution track progress on inquiries, applicants, admits, and enrolled students so that adjustments can be made to the plan if needed. Ideally you'll want three to five years of data to truly identify trends.

Funnel reports should be created for each enrollment goal:

- FTIC
- Transfer
- High-ability
- Out-of-state
- Others?

Utilize sound data to drive marketing
and quality improvement efforts



Examples of other data that can be utilized:

- Market research
- Demographic trends
- ACT and College Board data
- CIRP (Cooperative Institutional Research Program)
- E-expectations survey

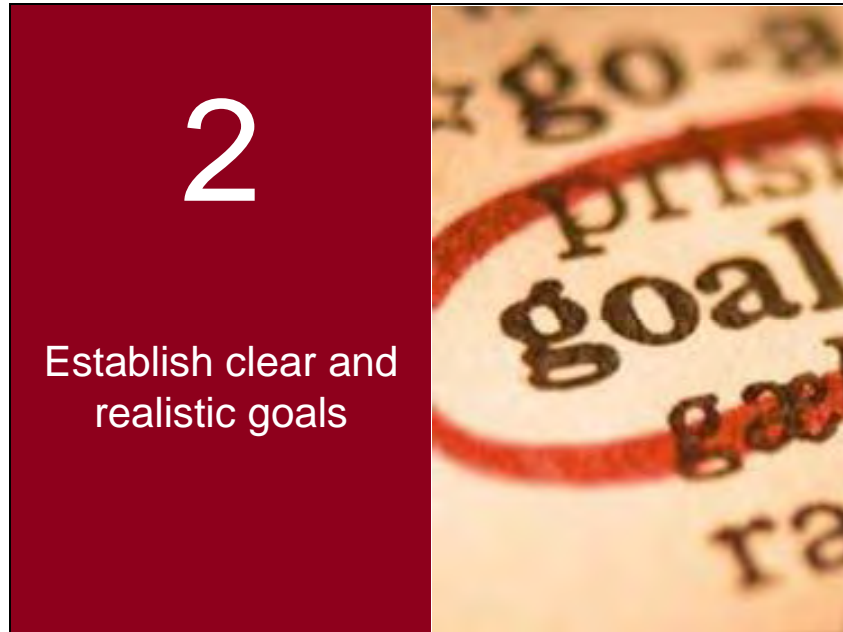
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Define the current
state of new student
enrollment



It is important to understand the current state of enrollment for your university:

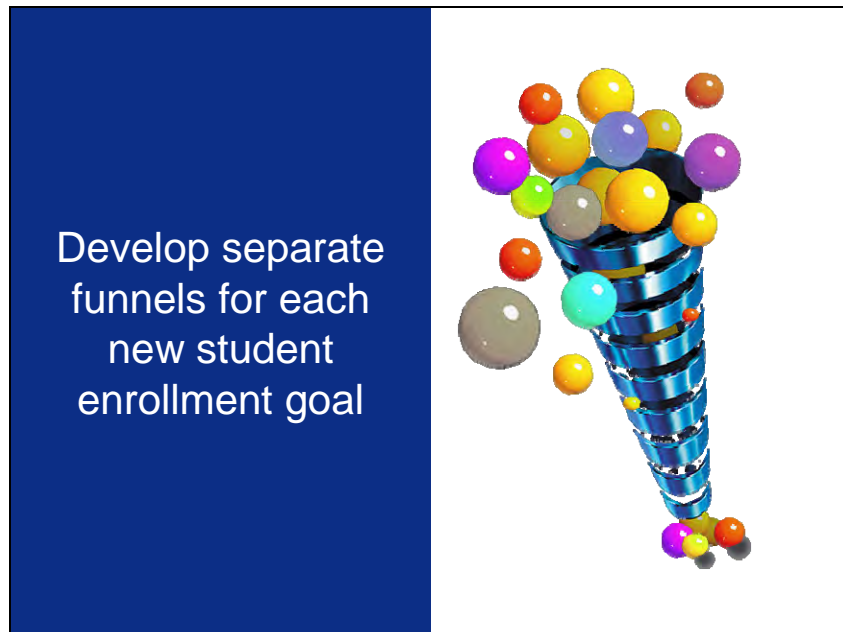
- Where is it strong?
- Where do you need improvement?



Goal setting should be a collaborative effort that utilizes historical data.

Factors to consider:

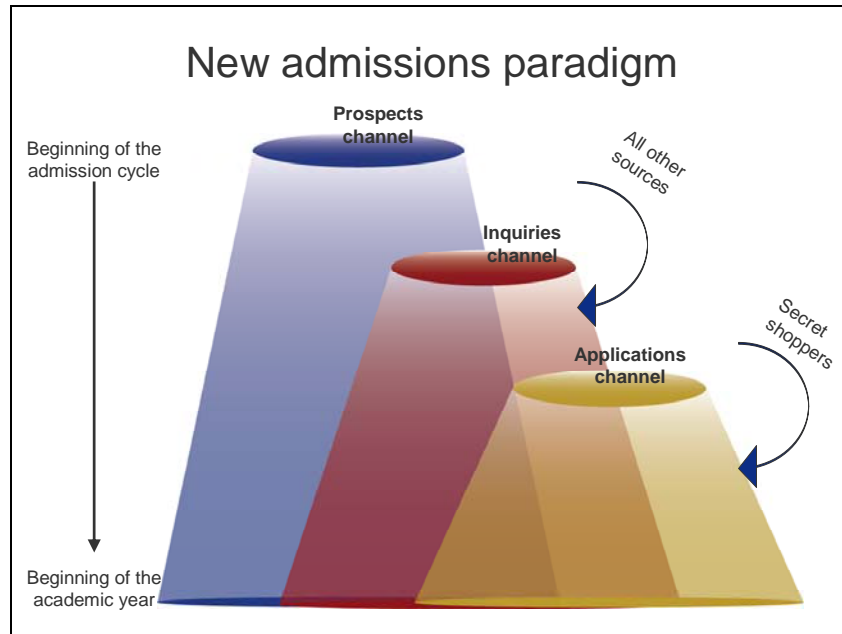
- Total enrollment goals for the university
- New student goals
- Retention and graduation rate goals
- Three-year averages – are the goals realistic?



A typical problem on most college campuses is that only one funnel is created for all students.

Different populations of students require different strategies and will have different conversion and yield rates. Therefore, separate funnels should be developed.

What are the enrollment goals for your campus and what funnels do you need to build?



This is a slightly different way of looking at the admissions cycle.

Think about the beginning of the admissions cycle as the first point of contact an institution has with students. Let's use the example of NL University's class of 2010. Today the number of prospects, inquiries, and applications for the class of 2010 is very small at this moment, but by the time August of 2010 comes around, the prospect pool will grow exponentially (as will our inquiries and applications).

Some prospects move into the inquiry channel, and then may move into the application channel (which is shown by the overlapping cones/channels), while other sources will also produce students within our inquiry pool. With more and more students falling into the secret shopper category, it's important to look for a way to illustrate this growing phenomenon.

How many new students
do we want in the entering class?



The new student enrollment goal should be consistent with the overall enrollment goal. Consider the three-year average for inquiries, applicants, admits, deposits, and enrolls for the entering students.

Set enrollment goals
by academic program

Major	Enroll Goal	Prosp	Inq	App	Acc	Enr

Create funnels by academic division or major. Has there been an enrollment decline or growth in any given area? This data can help with strategy development.

Further define
the desired
enrollment state
by setting specific
sub-population goals



Subpopulations to consider:

- Out-of-state
- Minorities
- Athletes
- Residents
- Others?

Recruitment priorities

Maintaining freshman enrollment?

Enrollment growth for transfers?

Racial/ethnic diversity?

State accountability?

Geographic diversity?

Quality?



What are the recruitment priorities for your campus?

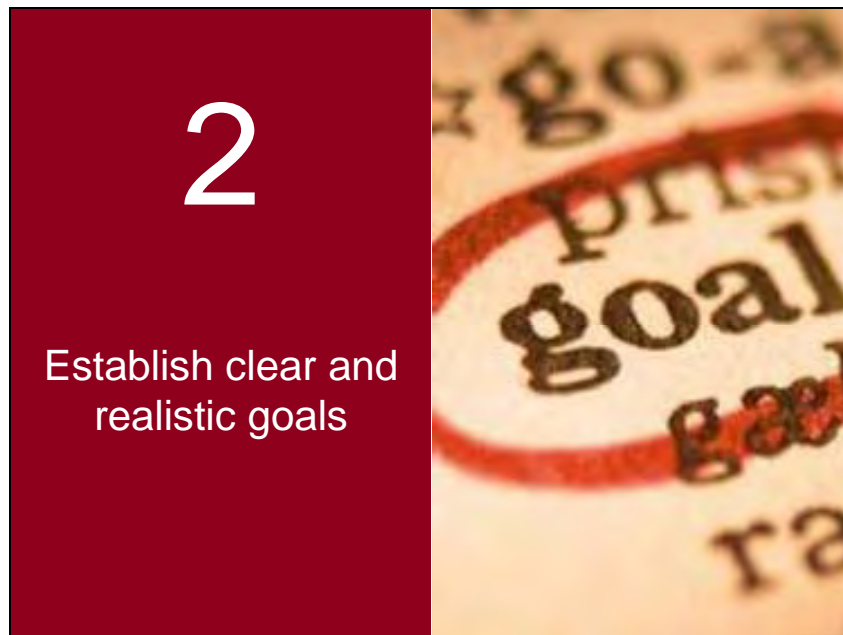


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Define the current state of new student enrollment

It is important to understand the current state of enrollment for your university:

- Where is it strong?
- Where do you need improvement?



2

Establish clear and realistic goals

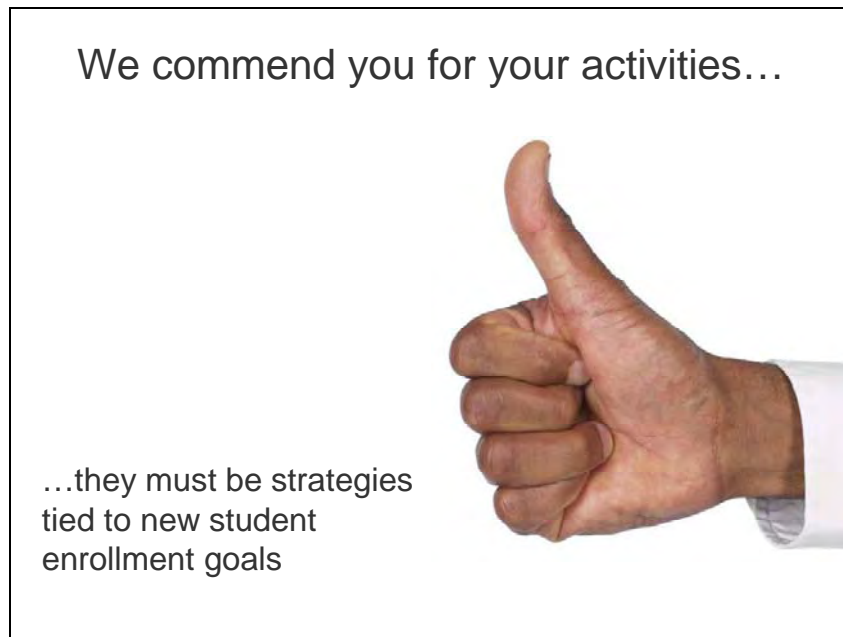
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Factors to consider:

- Total enrollment goals for the university
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Strategies should be specific to reach stated goals.



Does each recruitment activity have an intended goal?
Are there some activities you currently do that are not helping you reach the goals?

Key recruitment strategies

- Recruitment marketing
- Territory management
- Pricing
- Campus visit programming
- Funnel management
- Operations
- Organizational design and development



These strategies should be updated to reflect the individual needs and goals of the campus.

Develop strategies to improve the quality and quantity of your inquiry pool



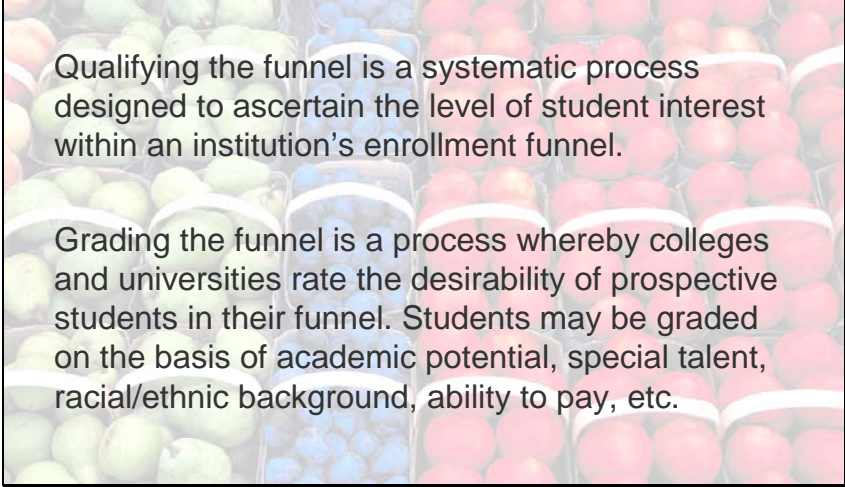
A typical problem for many colleges is an insufficient number of inquiries or a mix of inquiries that does not convert at a high enough rate.

Generate inquiries from four main sources

Inquiry Source	Goal
Campus	8,000
Travel	3,500
Student	2,500
Referral	1,500
Total	15,500

The conversion on each of these inquiry sources will differ. It is important to use historical data before setting goals by source.

Manage the funnel through grading and qualifying



Qualifying the funnel is a systematic process designed to ascertain the level of student interest within an institution's enrollment funnel.

Grading the funnel is a process whereby colleges and universities rate the desirability of prospective students in their funnel. Students may be graded on the basis of academic potential, special talent, racial/ethnic background, ability to pay, etc.

Qualification and grading helps the school work smarter, not harder. Both can help to target phone calls, travel, and written communication.

Monitor more than one population – each with different buying motives and goals



- First-time-in-college (FTIC)
- Transfer
- Adults
- Distance
- Minorities

Sample inquiry source analysis

Source	Inqs	Apps	Conv. %	Deps	Yield
Campus Visit	171	50	29.2%	15	8.8%
High School	568	58	10.2%	14	2.5%
College Fair	3,886	250	6.4%	65	1.7%
Phone Call	355	67	18.9%	18	5.1%
Mail Inq	133	16	12.0%	1	0.8%
Athletic Ref.	92	3	3.3%	2	2.2%
PSAT Search	1,965	69	3.5%	17	0.9%
Minister Ref.	192	4	2.1%	2	1.0%
ACT Scores	575	97	16.9%	35	6.1%
SAT Scores	150	29	19.3%	8	5.3%
Private Colleges	789	36	4.6%	10	1.3%
College Outlook	140	1	0.7%	0	0.0%

Knowing this data for previous years will help you to understand where you are year to year.

I always got concerned if the ACT scores that were submitted were lower one year than they were the year before.

ACT scores provide valuable data that many schools do not use.

Sample inquiry qualifying scales

- Very interested
- Somewhat interested
- Uncertain
- No longer interested

- Top choice
- Will apply
- Interested, but no commitment to apply
- Not likely to apply
- No longer interested

Which of these inquiry qualifying scales is more meaningful and useful?

The qualification code should be stored in the student information system and updated each time contact is made with a prospective student.

Ask for the level of interest:

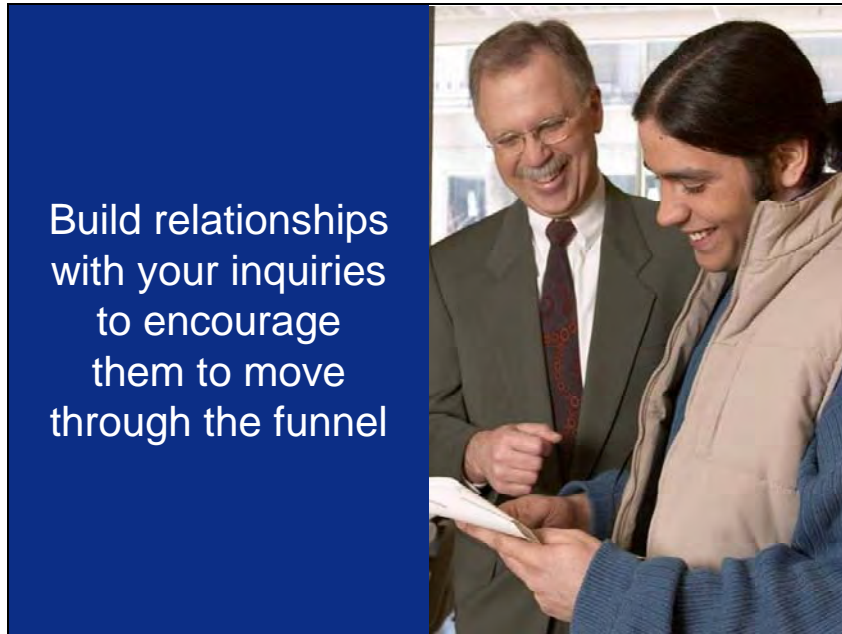
- On the phone
- At college fairs
- At high school visits
- On the application

It is important to continue qualification at the applicant and deposited stages as well.

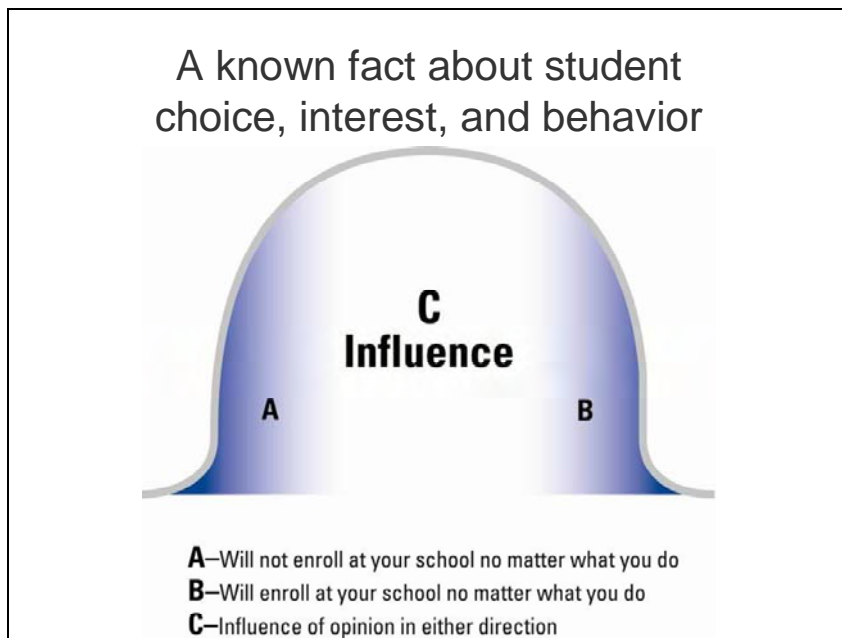
Sample strategy

Source	Inquiries
Travel-initiated	5,600
Referrals	1,000
Student-initiated	7,750
Solicited	8,150
Total	22,500

To generate at least 22,500 inquiries of the right type and mix to achieve enrollment goals. Seek the these numbers from four main categories of inquiry sources.

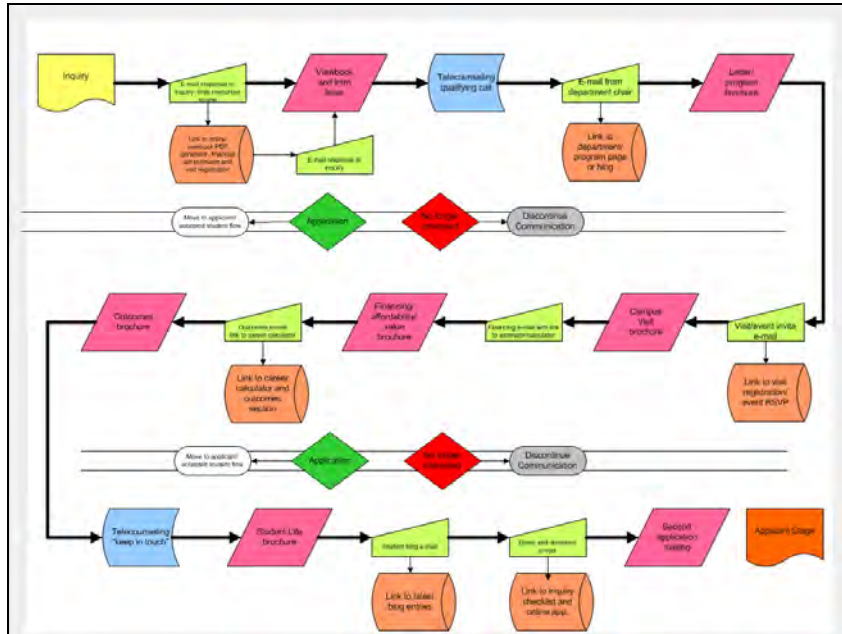


Choosing a college is unlike most other high-priced purchases. It is much more of a process – one where the student can change or abandon the decision at any point. Developing strategies that will build and sustain the relationship is key.



It is not possible to communicate with every inquiry (or maybe even every applicant, depending on the school).

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This is a sample communications flow that reflects written, electronic, and telecounseling during the inquiry stage only.

Communication needs to continue at the applicant, admit, and deposited stages.

How can you get the most out of
your campus visit programs?



What are you doing to make your visit program unique? If a student visits your campus and then your biggest competitor, how is your campus standing out? Are you vanilla? I work with a school with a really neat arch on campus.

Campus visit programs:

- Group:
 - Open houses
 - Senior days
 - Transfer days
- Individual:
 - Day
 - Overnight

Are applicants and deposits invited to visit?

- Individual visits
- Yield events
- Orientation days



When was the last time you took the money walk on your campus? This is the walk that you (and hopefully key administrators) take about once a year to assess the campus. Ideally you take the same path that you take with campus visitors. You're looking for cracks in the walks, trash, deferred maintenance.

The other area you're trying to assess is, of course, the message from your tour guide. What are saying about your campus? Are they giving features and not just benefits? For example, what you might hear is something like this, "South Hall, which was built in 1925, houses the English and history departments." This is more-or-less standard stuff, right?

Well, what about something like this: "South Hall, which was built in 1925, houses the English and history departments. There are two things that make South Hall unique and worth mentioning—the first is that the building was renovated in 1998 and all of the classrooms are smart classrooms with access to Internet for faculty. There's also a wireless network throughout this building as well as the entire campus. Another thing that's unique about our English and history departments is the wonderful opportunities for off-campus study. Our faculty find that their curriculum is enhanced when they're able to bring topics to life. There's a Shakespeare class that goes to England and a history class that'll go to Mayan Ruins..."

Territory management allows staff to take ownership of their individual enrollment funnels



Base travel selection on the systematic assessment of actual results and on the strength of the current inquiry pool.

Many schools find that they can reduce travel and be even more effective.

Consider other territory management strategies besides high school visits and college fairs:

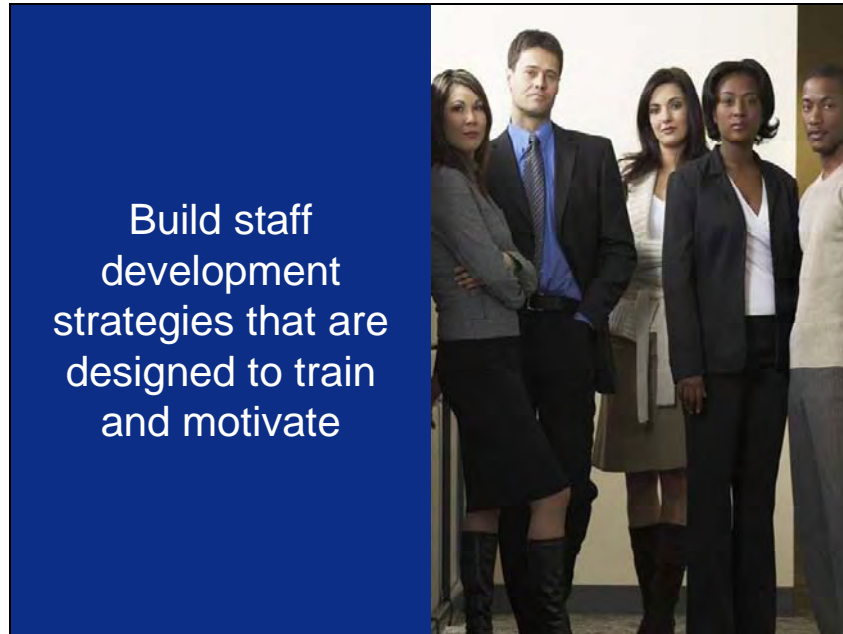
- Hotel interviews
- Off-campus receptions
- Yield events

Sample strategies

Implement a lengthened and sequential written communications flow designed to increase the conversion rate from inquiry to applicant (at least six pre-application communications).

Implement a hotel interview program to increase the conversion rates in secondary markets. Attempt to see at least 75 students in this setting.





Consider the revenue that is generated from tuition – the recruiter/admissions counselor plays a key role in the success of the university. If each student generates about \$15,000 per student and each recruiter is supposed to bring in 50 students, each admissions person is responsible for generating \$750,000.



Think creatively about rewarding your staff. Perhaps you can't make monetary rewards to your staff, but there are other things you may be able to do.

Cross-training of admissions, marketing, recruitment, and financial aid staff members creates a better team atmosphere




It is important for all members of the team to work toward the same goal. The “that’s not my job” mentality will be a barrier to enrollment success.

Cross-training provides the knowledge necessary to assist the prospective student and parents in this process. What are the most common questions asked by prospective students? Can everyone provide accurate answers to them?

Sample strategy



Design and conduct an ongoing program of staff development/training and foster an admissions office climate that is goal-oriented, rewards achievement, and provides an opportunity for professional growth and development by individual staff.

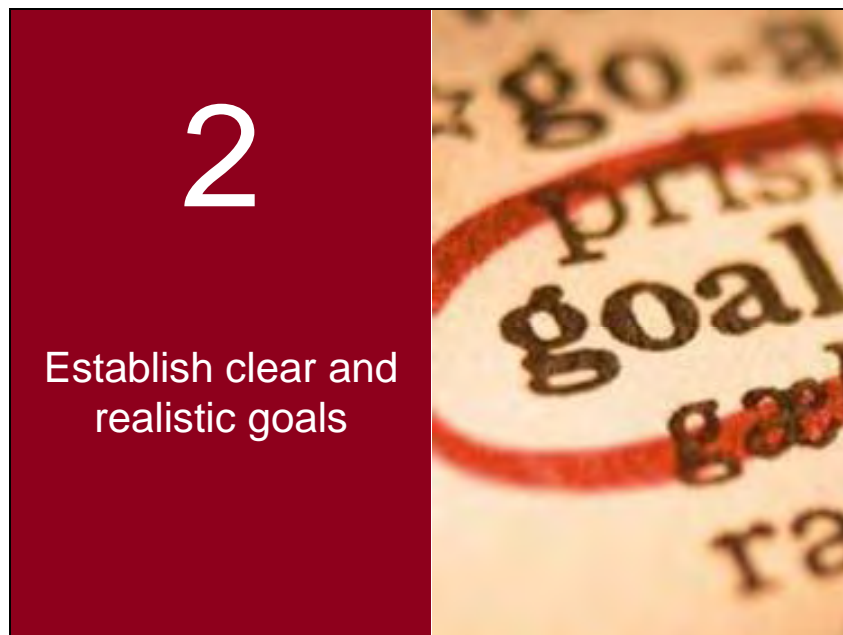


1

Define the current state of new student enrollment

It is important to understand the current state of enrollment for your university:

- Where is it strong?
- Where do you need improvement?



2

Establish clear and realistic goals

Goal setting should be a collaborative effort that utilizes historical data.

Factors to consider:

- Total enrollment goals for the university
- New student goals
- Retention and graduation rate goals
- Three-year averages – are the goals realistic?

3

Develop strategies to reach the goals



Strategies should be specific to reach stated goals.

4

Put your strategies into action – write the plan



Once the goals have been set and strategies identified, it is time to put the who, what, when, where, and why into place.

The action plan should guide daily operations in the admissions office.



An action plan cannot be too detailed. Make the action plan so clear that a new staff member could almost pick it up and run with it!

Action plan components

- What are you going to do?*** Describe in detail activities that are generally quantifiable and measurable.
- When are you going to do it?*** Provide timetables that clearly show key dates and deadlines.
- Who will be responsible?*** Assign specific tasks and communicate assignments clearly to those who will be responsible for performing them.
- How much will it cost?*** Include budget information showing the cost of implementation.
- How will you know when it has been accomplished?*** Define the methods of evaluation or control that will be used to monitor progress or measure success or failure of the actions undertaken.

The action plans are the “meat” of the enrollment plan.

Have staff members write the action plans for strategies they are mainly responsible for:

- Creates more buy-in from the staff
- Helps guide and plan work

Assign and communicate responsibilities to individuals, rather than groups



Break down the timeline of tasks that need to be completed and assign responsibilities to individuals.

Provide detailed timetables



When does the task need to be completed? Backwards planning is key for creating workable timetables.

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<h2>Sample action plan</h2>				
Goal: To enroll a total of 1,350 new students for fall.				
Strategy: To generate 15,000 inquiries of the right type to achieve enrollment goals.				
Activity	Responsibility	Timetable	Budget	Control/ Evaluation
Conduct ACT EOS direct mail search on cycle 1	Associate director of admissions	EOS applications October; mailed in mid-December	\$775 for 5,000 labels	Was search conducted? Determine yield rates from EOS mailing.

Action plans are fairly easy to create and should be a group project.

<h2>Sample action plan</h2>	
Denver SPIS Action Plan	
KEY STRATEGY/ENABLING OBJECTIVE: Conduct one summer and one fall Student-Parent Information Session (SPIS) in Colorado to attract at least 40 families.	
Description/Explanation: SPIS events will enable families to get information about our college in their home states. These events include a showing of the college video, an address by the dean of admissions (or the director of admissions), and a question-and-answer session with parents of current students and alumni. The summer event will include a panel of current students. They will take place on Sunday evenings and last for approximately two hours.	
IMPLEMENTATION SCHEDULE/TIMETABLE	
Task	Completion Date
Reserve hotel for fall Denver SPIS	8/1
Draft invitation for fall Denver SPIS event	8/2
Mail invitations for fall Denver SPIS event	8/28
Contact three alumni to participate in fall Denver SPIS event	9/1
Reconfirm all arrangements with hotel for fall Denver SPIS	10/1
Call all students who have registered for fall Denver SPIS to confirm their reservations	10/7
Hold fall Denver SPIS event	10/14
Follow up with attendees of fall Denver SPIS	10/31
RESPONSIBILITY: The Colorado admissions counselor will have primary responsibility of organizing and executing this plan.	
BUDGET: Neutral (repeating event)	
EVALUATION/CONTROL: SPIS events will be evaluated based on the conversion and yield they produce at the end of the academic year. Each program will be evaluated this way before it is instituted in following years.	

Here's another example of an action plan, with a few task steps left out.



How will we
evaluate
the effectiveness
of the strategy?

Each action plan should include a method of evaluation.

Examples of evaluation methods:

- Conversion and yield rates of students who attended X event
- Positive feedback given on evaluation forms for an on-campus event
- Increase in alumni referrals after a referral campaign was implemented



Was this activity worth the
investment of time and money?

Consider whether or not the strategy paid off:

- Is it worth repeating in the next year's recruitment plan?
- Do strategies need to be revised for the next year?

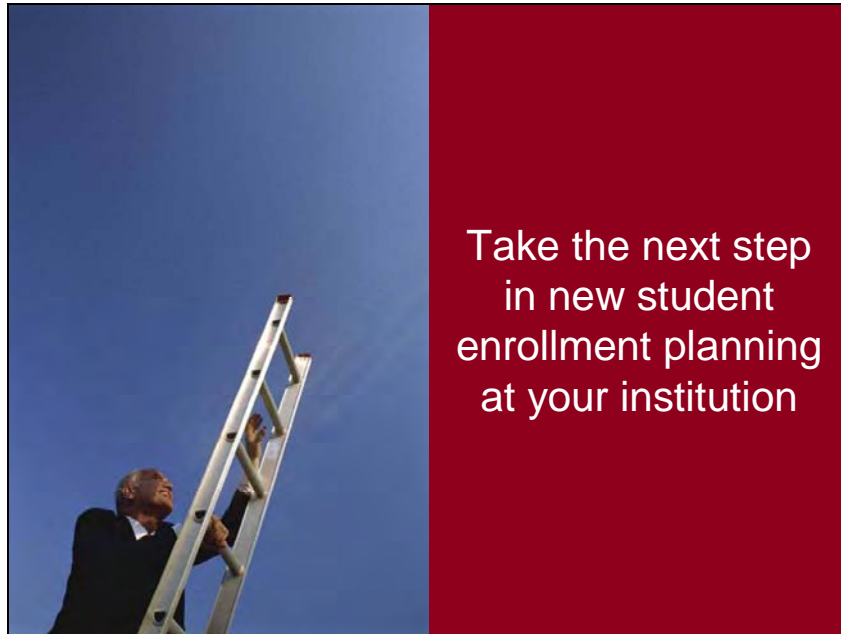
If the strategy did not work, don't be afraid to abandon it and try something new.

Track results!



Implement a method to track the effectiveness of each strategy:

- Inquiry source analysis
- Search response rates
- Conversion and yield on campus visitors
- Conversion and yield on students seen during high school visits
- Increase in test scores
- Other results?



Follow the four steps to creating your recruitment plan.

Get everyone involved – assign someone to oversee the writing of the plan, but delegate responsibility for writing the action plans to individual staff members.

Update the annual plan – learn what works and what may need improvement.

Develop annual and long-term recruitment plans to reach your desired destination



By developing a road map to reach your goals, you'll find the path much easier to maneuver and you'll be providing a wonderful tool for those who follow you.

Embrace new student enrollment planning from start to finish!



We discussed four key points that can make a difference in your world:

1. Define the current state of new student enrollment
2. Establish clear and realistic goals
3. Develop strategies to reach each goal
4. Put your strategies into action – write action plans

“Change can be either friend or foe...

it is disturbing when it is done **to** us,
exhilarating when it is done **by** us.”

R.M. Kanter,
The Change Master



What are questions we haven't uncovered yet today?

